

Office of Human Resources Performance Review

Joseph Adler, Director
December 3, 2010



CountyStat Principles

- **Require Data Driven Performance**
- **Promote Strategic Governance**
- **Increase Government Transparency**
- **Foster a Culture of Accountability**



Agenda

Meeting Goal: Determine the impact of OHR work on headline measures and establish new performance expectations and goals.

▪ **Headline Performance Measures**

- Customer Satisfaction
- Training & Organizational Development
- Recruitment and Selection
- EEO & Diversity Management
- Labor/Employee Relations
- Benefits



Performance Measures

Customer Satisfaction

- Average customer satisfaction rating on the internal customer survey of County managers

Training & Organizational Development

- Customer satisfaction with OHR training

Recruitment and Selection

- Average number of days to fill a vacant position in County employment
- Average satisfaction rating of departments with pools of candidates for positions

EEO & Diversity Management

- Percent of employees within each workforce utilization group

Labor/Employee Relations

- Percent of grievances resolved before reaching a third party neutral

Benefits

- Healthcare trend history and Cost containment for the County's prescription plan (***New Measures***)
- Monitor the ERS disability retirement process for active employees and continuing the re-evaluation of retirees receiving disability retirement (***New Measure***)



Departmental Reflections on Annual Performance (1 of 3)

What is the Department's perception of their overall performance?

- Given that there have been changes in a number of the existing processes and have been a number of new processes during FY10, OHR has seen the performance measures reflect this.
- Overall the number of employees have decrease and therefore the number of diverse employees have decreased with the exception of Hispanic/Latino.
- The percentage of grievances resolved before reaching third party neutral decreased by 6 percent because more employees are using the ADR process.
- Employees' satisfaction with training increased approximately 2.5%. However OHR decreased the number of trainings offered during FY10.
- Prescription cost reduction strategies decreased the cost of the County health care.



Source: OHR

Departmental Reflections on Annual Performance (2 of 3)

What factors influenced Departmental performance?

- Significant budget cuts which caused OHR to lapse a number of vacant management positions such as the M2 Change Manager for 6 mos., M3 Recruitment and Selection Manager for 6 mos. the M2 labor manager position for the entire year and the ERP back-fill relating to ERP for the M3 IT Manager position for the entire year.
- In addition, a number of staff positions were lapsed such as, an HR Specialist position in Classification for .75 of the year, an HR Specialist in Change Management for .45 work year and two staff, one from Records Management and another from Recruitment and Selection worked half time for 6 mos. at ERP in order to facilitate OHR's transition to ERP.
- Budget cuts in operational funds such as the training, vacant position advertisements and classification studies.
- Planning and implementation of ERP, RIFs, RIPs and furloughs.
- Reopeners with MCGEO, FOP, IAFF and implementation of the agreements
- New hiring process with emphasis on MLS diversity hiring



Source: OHR

Departmental Reflections on Annual Performance (3 of 3)

How does the Department expect to improve overall performance?

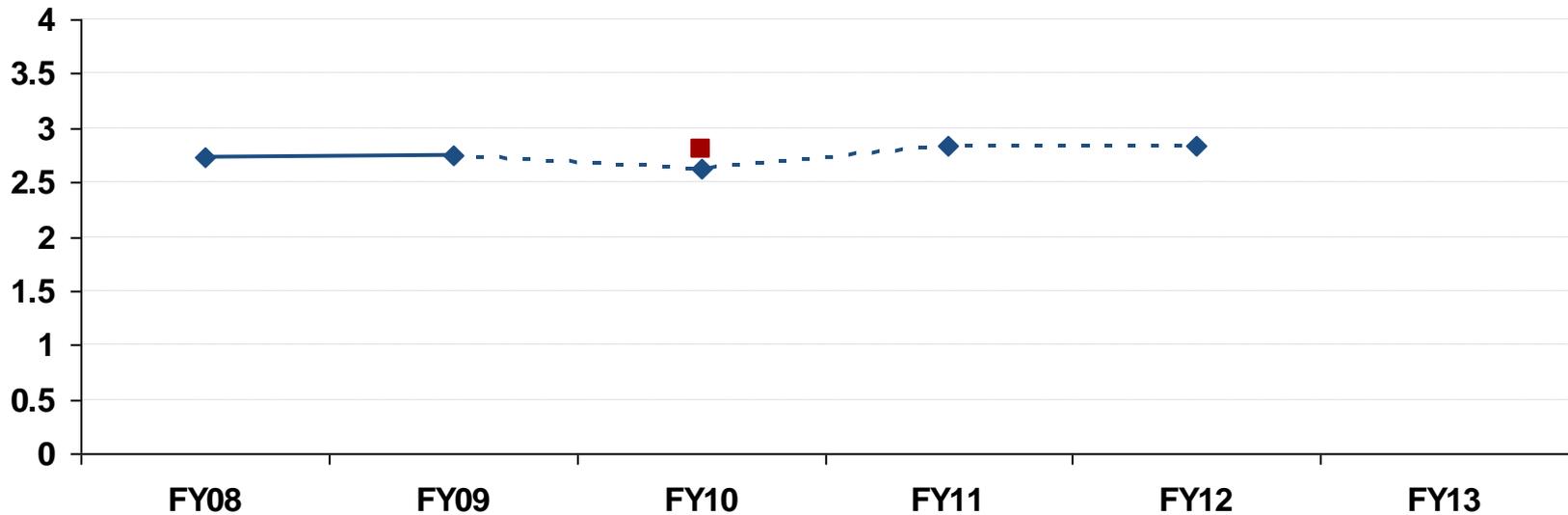
- OHR will implement ERP which will streamline some of its processes, ensuring the processes are more automated to include disability retirement records.
- OHR will continue to partner with other departments and agencies to deliver training in a cost effective manner that satisfies the customer.
- OHR will work with departments to hire appropriate and diverse staff while monitoring the categories of employees who separate from County service due to RIFs and other major initiatives.
- OHR will work to standardize policy and contractual language with the employee associations in order match processes with the information technology standard processes.



Source: OHR

Customer Satisfaction - Headline Measure

Average customer satisfaction rating on the internal customer survey of County managers



	FY08	FY09	FY10 Actual*	FY11 Proj	FY12 Proj	FY13 Proj
Measure	2.73	2.66	2.62	2.83	2.83	--
			FY10 Estimate			
			2.80			

*FY10 Interim internal survey results as of 12/1/2010. 194 respondents thus far.

Source: MLS Internal Customer Survey



Customer Satisfaction - Headline Measure

Contextual Data: Average customer satisfaction rating on the internal customer survey of County managers

Internal Customer Survey Questions

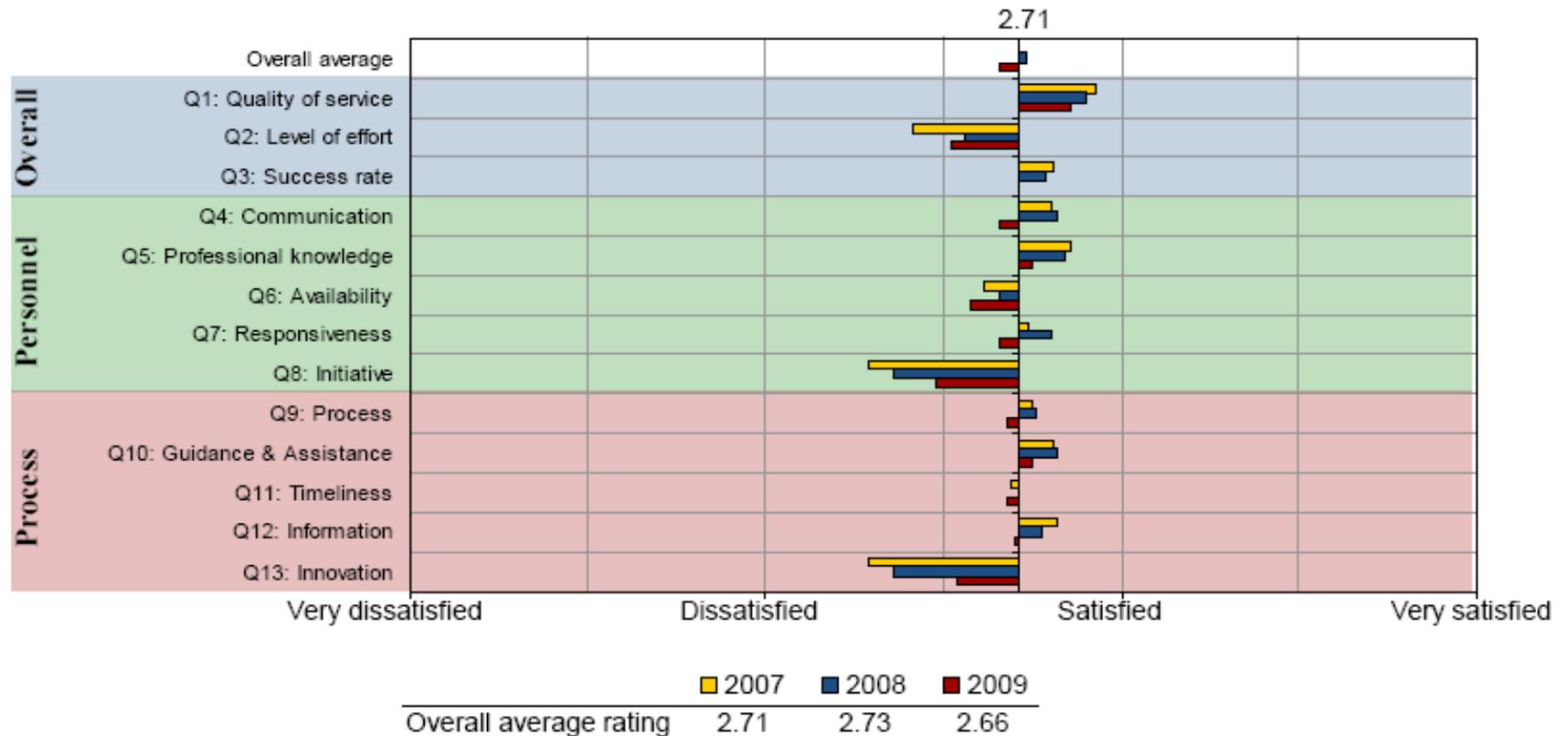
1. Quality of Service: Rate your satisfaction with the overall quality of service received by the following Departments.
2. Level of Effort: Rate the level of effort your Department must invest to successfully utilize the Department's service(s).
3. Success Rate: Rate how often the following Departments successfully meet the needs and requirements of your Department.
4. Communication: Rate how often Department staff were able to explain and answer questions to your satisfaction.
5. Professional Knowledge: Rate how often you were satisfied with the professional knowledge exhibited by the Department staff.
6. Availability: Rate how often your first attempt to reach Department staff was successful.
7. Responsiveness: Rate how often you were satisfied with the responsiveness of the Department staff.
8. Initiative: Rate how often you were satisfied with the amount of initiative taken by Department staff in addressing your needs and requirements.
9. Process: Rate your overall satisfaction with the process(es) the Department uses to address your needs or requirements.
10. Guidance & Assistance: Rate your satisfaction with the guidance and assistance provided for the process(es).
11. Timeliness: Rate your satisfaction with the timeliness of the process(es) to satisfy your needs and requirements.
12. Information: Rate your satisfaction with the amount of information provided to you about the status of your request.
13. Innovation: Rate your satisfaction with the Department's ability to innovate in order to satisfy your needs.



Customer Satisfaction - Headline Measure

Contextual Data: Average customer satisfaction rating on the internal customer survey of County managers

2007-2009 Internal Customer Survey Results



Source: MLS Internal Customer Survey

Customer Satisfaction - Headline Measure

Contextual Data: 2010 Interim Internal Customer Survey Results

Question	Very Dissatisfied	Dissatisfied	Satisfied	Very Satisfied	Not Applicable	Total Ratings (Excl N/A)	Average Rating
Q1: Quality of Service	10.4% (20)	19.8% (38)	47.4% (91)	20.8% (40)	1.6% (3)	189	2.80
Q2: Level of Effort	24.5% (46)	27.1% (51)	30.3% (57)	15.4% (29)	2.7% (5)	183	2.38
Q3: Success Rate	12.0% (23)	27.2% (52)	41.4% (79)	17.3% (33)	2.1% (4)	187	2.65
Q4: Communication	11.9% (22)	29.2% (54)	37.3% (69)	19.5% (36)	2.2% (4)	181	2.66
Q5: Professional Knowledge	12.5% (23)	24.5% (45)	42.9% (79)	17.4% (32)	2.7% (5)	179	2.67
Q6: Availability	14.9% (27)	28.7% (52)	38.1% (69)	16.6% (30)	1.7% (3)	178	2.57
Q7: Responsiveness	13.3% (24)	24.4% (44)	45.6% (82)	14.4% (26)	2.2% (4)	176	2.63
Q8: Initiative	17.6% (32)	24.7% (45)	40.1% (73)	14.3% (26)	3.3% (6)	176	2.53
Q9: Process	15.2% (26)	18.1% (31)	48.5% (83)	15.2% (26)	2.9% (5)	166	2.66
Q10: Guidance & Assistance	13.1% (23)	21.1% (37)	44.0% (77)	17.7% (31)	4.0% (7)	168	2.69
Q11: Timeliness	14.0% (24)	20.3% (35)	45.3% (78)	16.9% (29)	3.5% (6)	166	2.67
Q12: Information	14.0% (24)	19.2% (33)	47.1% (81)	15.1% (26)	4.7% (8)	164	2.66
Q13: Innovation	17.9% (31)	21.4% (37)	40.5% (70)	11.0% (19)	9.2% (16)	157	2.49

Interim internal survey results as of 12/1/2010. 194 respondents thus far.

Interim OHR Survey Average = 2.62



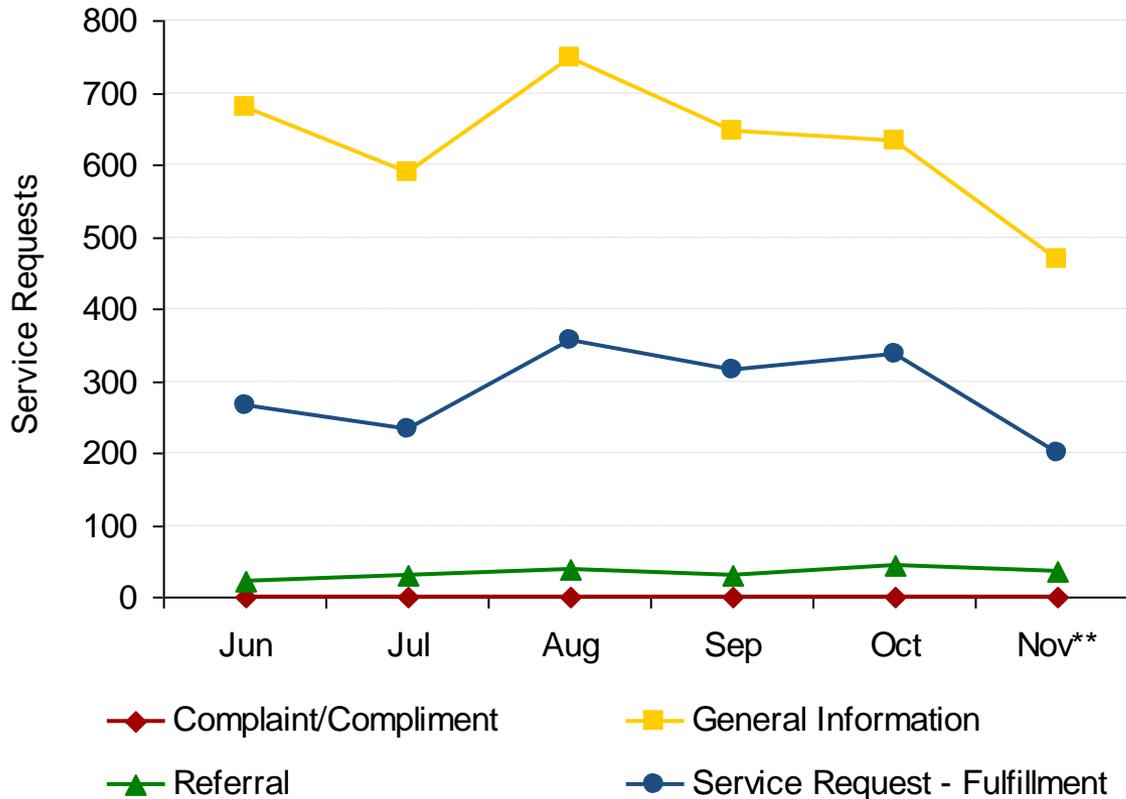
Source: MLS Internal Customer Survey

Customer Satisfaction

MC311 Data, All Service Requests (SRs)

Jun-Nov 2010

Service Requests by SR Type, Jun-Nov 2010



Service Requests by Sub-Area, Jun-Nov 2010

Sub Area	Total
Benefits	1,887
Recruitment & Selection	1,153
Employment Verification	1,103
(blank)**	1,045
Records Management	335
Occupational Medical Services	41
Labor/Employee Relations	35
Other	31
Training and Organization Dev	20
Hiring	12
General Information	10
EEO & Diversity Management	8
Grand Total	5,680

**November is only a partial month

Source: Siebel MC311 database

**83% of SRs without a sub-area were General Information requests



Customer Satisfaction

MC311: Top 10 Types of Calls for Information

Service Requests, Jun-Nov 2010

#	Attached Solution	Number of SRs
1	Verification of County employment	1,025
2	Location, hours and parking for the Office of Human Resources	298
3	Fax numbers for the Office of Human Resources	291
4	Request to discuss benefits	215
5	Process to apply for County positions	176
6	Inability to reach employee/personnel benefits team	130
7	Request change to address for benefits, retirement or tax purposes (current or former employee)	121
8	Check Status of Application for Employment	113
9	Application status for a specific requisition	100
10	OHR Solution Not Found	98

Definition (11/5/10 CountyStat Mtg)

General Information: These calls typically constitute 50% of a Customer Service Center's calls and deal with responses to Frequently Asked Questions (FAQs); provide static information about policies and procedures, County government events, and operations

Source: Siebel MC311 database



Customer Satisfaction

MC311: Top 10 Types of Department Service Fulfillment Requests

Service Requests, Jun-Nov 2010

#	Attached Solution	Number of SRs
1	Request to discuss benefits	404
2	Inability to reach employee/personnel benefits team	306
3	Application status for a specific requisition	180
4	Wait times for return of phone call messages	133
5	Request change to address for benefits, retirement or tax purposes (current or former employee)	67
6	Check Status of Application for Employment	61
7	OHR Solution Not Found	58
8	Request a meeting with a Benefits Specialist	54
9	Verification of County employment	41
10	Request for benefits due to death of a County Retiree/Employee	26

Definition (11/5/10 CountyStat Mtg)

Service Fulfillment Requests: These calls typically constitute 20% of a Customer Service Center's calls. A service request is created for a department to fulfill a resident's request.

Source: Siebel MC311 database



Customer Satisfaction

MC311: Top 10 Types of Referrals

Service Requests, Jun-Nov 2010

#	Attached Solution	Number of SRs
1	Request to discuss benefits	40
2	Verification of County employment	23
3	Application status for a specific requisition	18
4	Inability to reach employee/personnel benefits team	18
5	Wait times for return of phone call messages	17
6	Request change to address for benefits, retirement or tax purposes (current or former employee)	12
7	Request a meeting with a Benefits Specialist	9
8	Access problems/errors with submission of application/resume	7
9	Check Status of Application for Employment	6
10	Name of recruiter for a specific department	6

Definition (11/5/10 CountyStat Mtg)

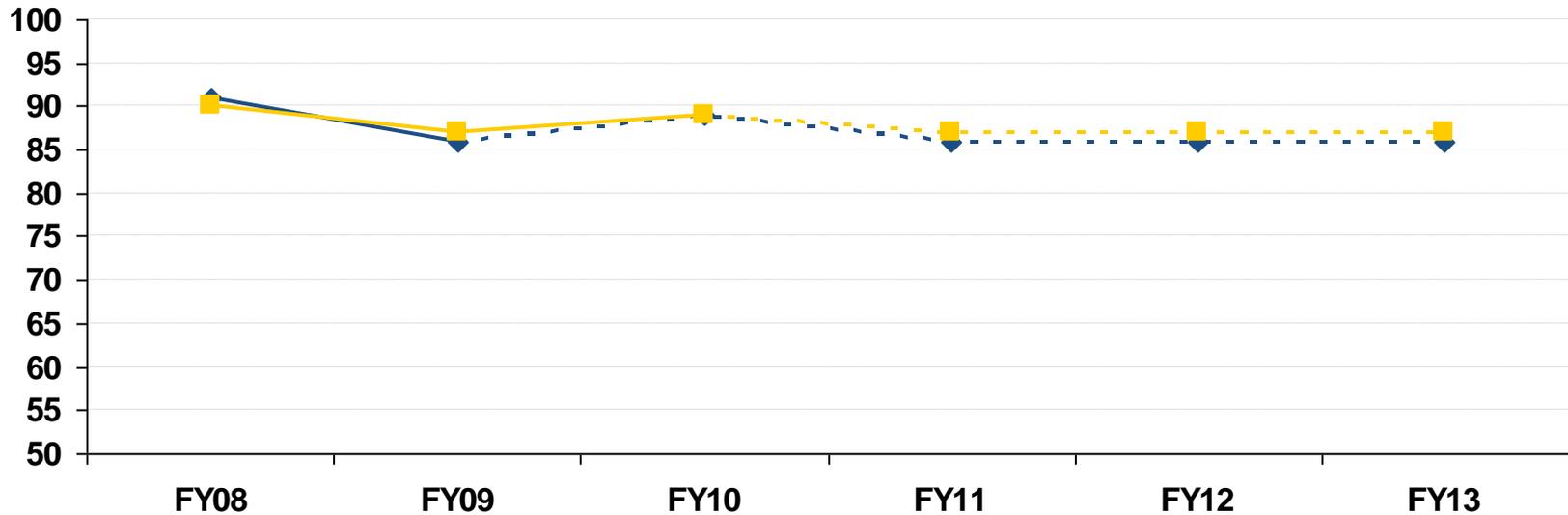
Referrals: These calls typically constitute 25% of a Customer Service Center's calls and provide constituents with the telephone number for a call requiring "subject matter expertise" and perform a "warm transfer" of the call, if required.

Source: Siebel MC311 database



Training & Organizational Development - Headline Measure

Customer satisfaction with OHR training



	FY08	FY09	FY10 Actual	FY11 Proj	FY12 Proj	FY13 Proj
Helpful to job	91	86	89	86	86	86
Helpful to professional development	90	87	89	87	87	87

FY10 Estimate
86
87



Source: OHR

Training & Organizational Development - Headline Measure

Contextual Data: Customer satisfaction with OHR training

- At last year's meeting, it was determined that OHR knows who took courses and the type of courses taken. OHR committed to send departments this information.
- To help department's manage employees' training requirements, OHR created a training history report for their use.
- OHR is unable to pull a list of employees who did not take mandatory training.

Department	Division	Employee	Class N.	Class Title	Requir	Audien	Start D.	End D.
0608	HEALTH & HUMAN SERVICES	C	24993	BIPOLAR DISORDER IN CHILDREN AND ADOLESCENTS			10/29/2009	10/29/2009
0609	HEALTH & HUMAN SERVICES	H	24231	HOUSING: THE CHALLENGE OF ASSESSMENT AND TREATMENT NOT MY CHILD: BARRIERS TO SAVING TEENAGERS FROM SELF-HARMFUL BEHAVIORS AND SUICIDE			11/9/2007	11/9/2007
0670	HEALTH & HUMAN SERVICES	H	24311	HOUSING: THE CHALLENGE OF ASSESSMENT AND TREATMENT NOT MY CHILD: BARRIERS TO SAVING TEENAGERS FROM SELF-HARMFUL BEHAVIORS AND SUICIDE			12/5/2007	12/5/2007
0671	HEALTH & HUMAN SERVICES	H	2410162	THE PROCESS OF VICTIMIZATION WITHIN THE FAMILY			11/7/2007	11/7/2007
0672	HEALTH & HUMAN SERVICES	E	24511	ASSESSING CAPACITY / CERTIFICATES OF COMPETENCY			4/16/2008	4/16/2008
0673	HEALTH & HUMAN SERVICES	E	24641	EMDR: AN INNOVATIVE PSYCHOTHERAPY COMES OF AGE?			5/3/2008	5/3/2008
0674	HEALTH & HUMAN SERVICES	E	24262	EVIDENAV ETHICS: CLINICAL PRACTICE IN AN INCREASINGLY COMPLEX WORLD			10/24/2007	10/24/2007
0675	HEALTH & HUMAN SERVICES	S	24511	MEDICARE AND MEDICAID: NAVIGATING THE MAZE OF MEDICAL ASSISTANCE			3/12/2008	3/12/2008
0676	HEALTH & HUMAN SERVICES	B	240331	TRAUMA TREATMENT: ADVANCED CLINICAL CASE SEMINAR PART I			4/23/2009	4/23/2009
0677	HEALTH & HUMAN SERVICES	B	240341	TRAUMA TREATMENT: ADVANCED CLINICAL CASE SEMINAR PART II			5/28/2009	5/28/2009
0678	HEALTH & HUMAN SERVICES	B	241501	TREATING COMPLEX TRAUMATIC STRESS DISORDERS: AN EVIDENCE BASED GUIDE			2/17/2010	2/17/2010
0679	HEALTH & HUMAN SERVICES	S	24161	ASSISTING CLIENTS NAVIGATING THE IMMIGRATION SYSTEM			9/26/2007	9/26/2007
0680	HEALTH & HUMAN SERVICES	S	24761	AUTISM AND OBSESSIVE-COMPULSIVE DISORDER IN CHILDREN AND ADOLESCENTS			9/25/2008	9/25/2008
0681	HEALTH & HUMAN SERVICES	S	241011	CONTEMPORARY FAMILY CHALLENGES: STRATEGIES TO ASSIST FAMILIES IN TRANSITION			10/23/2008	10/23/2008
0682	HEALTH & HUMAN SERVICES	S	24321	HELPING CHILDREN HEAL: PEDIATRIC EMOTIONAL TRAUMA TRAINING			12/10/2007	12/10/2007
0683	HEALTH & HUMAN SERVICES	S	241321	CONFLICT RESOLUTION FOR ADVOCATES: CASE, CONTEST AND CLOSURE			2/3/2009	2/3/2009

FY08-10 Training History Report

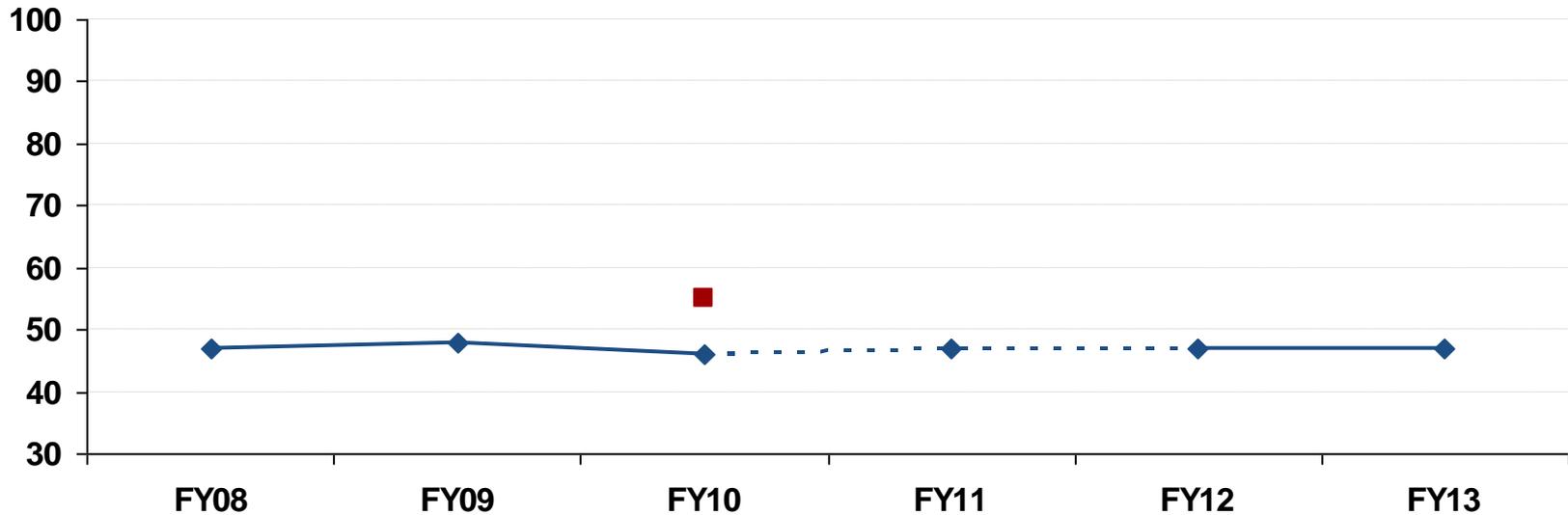
According to OHR, it is a department responsibility to ensure employees take mandatory training by reviewing the training catalog and training history report.



Source: OHR

Recruitment and Selection- Headline Measure

Average number of days to fill a vacant position in County employment



	FY08	FY09	FY10 Actual	FY11 Proj	FY12 Proj	FY13 Proj
Measure	47	48	46	47	47	47
			FY10 Estimate			
			55			



Source: OHR

Recruitment and Selection - Headline Measure

Contextual Data: Average number of days to fill a vacant position in County employment

Workload	FY05	FY06	FY07	FY08 thru June 10	FY09 thru June 15	FY10
Number of job announcements posted to career site	486	554	658	452	409	335
Number of resumes received and rated	33,695	37,642	45,393	32,526	35,414	27,119
Average number of resumes received per posted job announcement	69	68	69	72	87	81
Number of new hires - permanent full-time and part-time (merit)	613	727	772	830	341	140
Number of new hires - temporary	1,160	1,112	1,121	1,180	1,800*	838

***FY09 Temporary Hires – 1800**

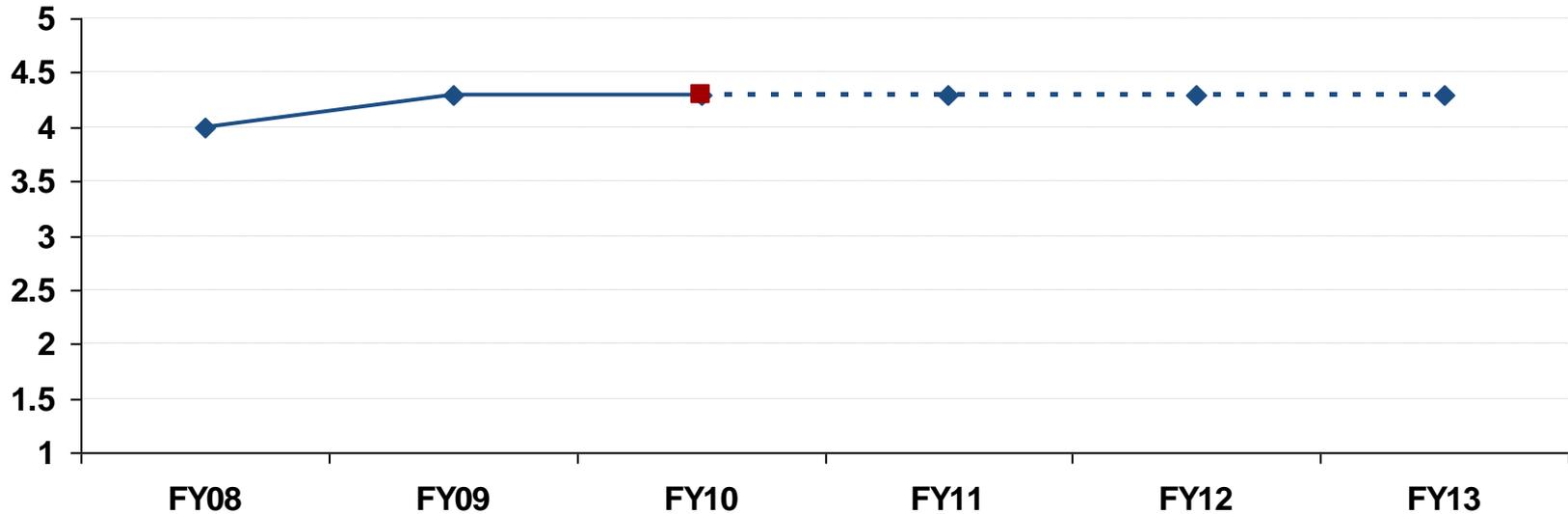
The number of FY 09 temporary hires is high due to the number of Board of Election temporaries that were hired (915).



Source: OHR

Recruitment and Selection- Headline Measure

Average satisfaction rating of departments with pools of candidates for positions



	FY08	FY09	FY10 Actual	FY11 Proj	FY12 Proj	FY13 Proj
Measure	4.0	4.3	4.3	4.3	4.3	4.3
			FY10 Estimate			
			4.3			



Source: OHR

Recruitment and Selection- Headline Measure

Contextual Data: Average satisfaction rating of departments with pools of candidates for positions

- Between 7/1/2009 - 6/30/2010, OHR sent out 150 satisfaction surveys to managers.

Rating (1-5; 1=Lowest, 5=Highest)	Total
1	0 (0%)
2	4 (3%)
3	16 (11%)
4	53 (35%)
5	74 (49%)
<i>No Rating</i>	3
Total	150



Data Source: OHR

EEO & Diversity Management - Headline Measure

Percent of employees within each workforce utilization group

	FY08	FY09	FY10	FY11 Proj.	FY12 Proj.	FY13 Proj.
White	56%	55%	55%	55%	--	--
Black	28%	29%	29%	28%	--	--
Asian	6%	6%	6%	6%	--	--
Hispanic	8%	8%	8%	8%	--	--
Native American	1%	1%	1%	1%	--	--
Not identified	2%	2%	2%	2%	--	--

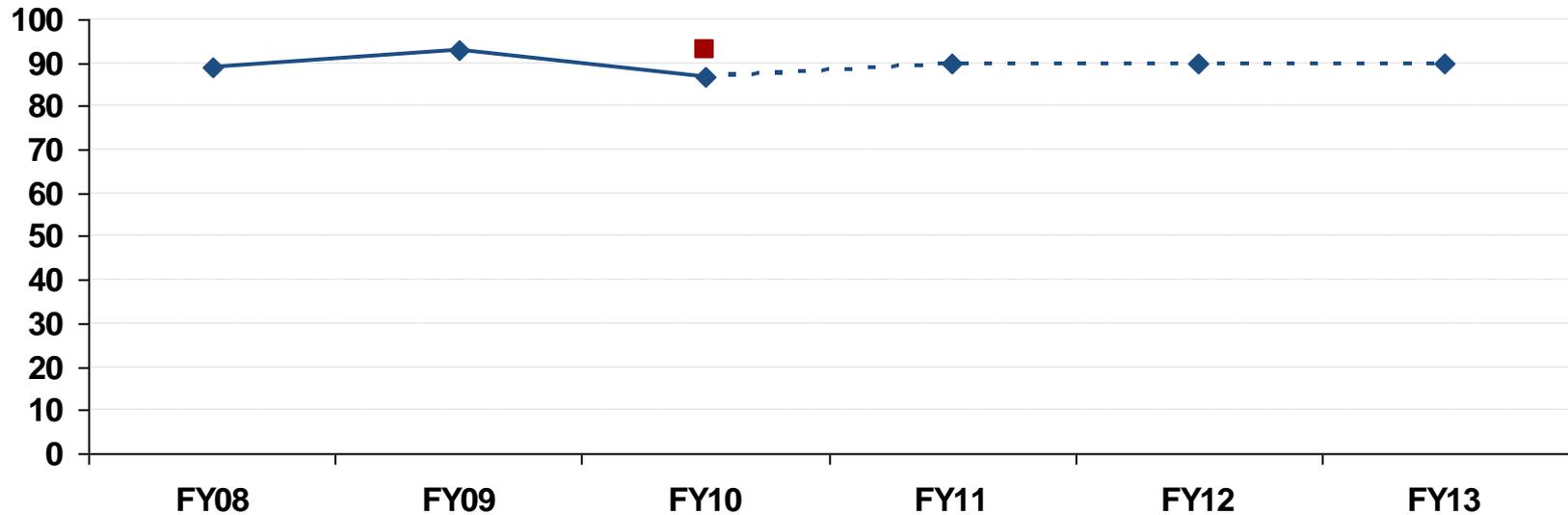
It is difficult to estimate the projection for FY12 and FY13 because of the impact of any future RIFs. The County's incumbents (those with greater seniority) disproportionately include white employees and those who are most likely to be affected by FY12 and FY13 RIFs are lower grades which are disproportionately minority employees.



Source: OHR

Labor/Employee Relations - Headline Measure

Percent of grievances resolved before reaching a third party neutral



	FY08	FY09	FY10 Actual	FY11 Proj	FY12 Proj	FY13 Proj
Measure	89	93	87	90	90	90
			FY10 Estimate			
			93			



Source: OHR

Labor/Employee Relations - Headline Measure

Percent of grievances resolved before reaching a third party neutral

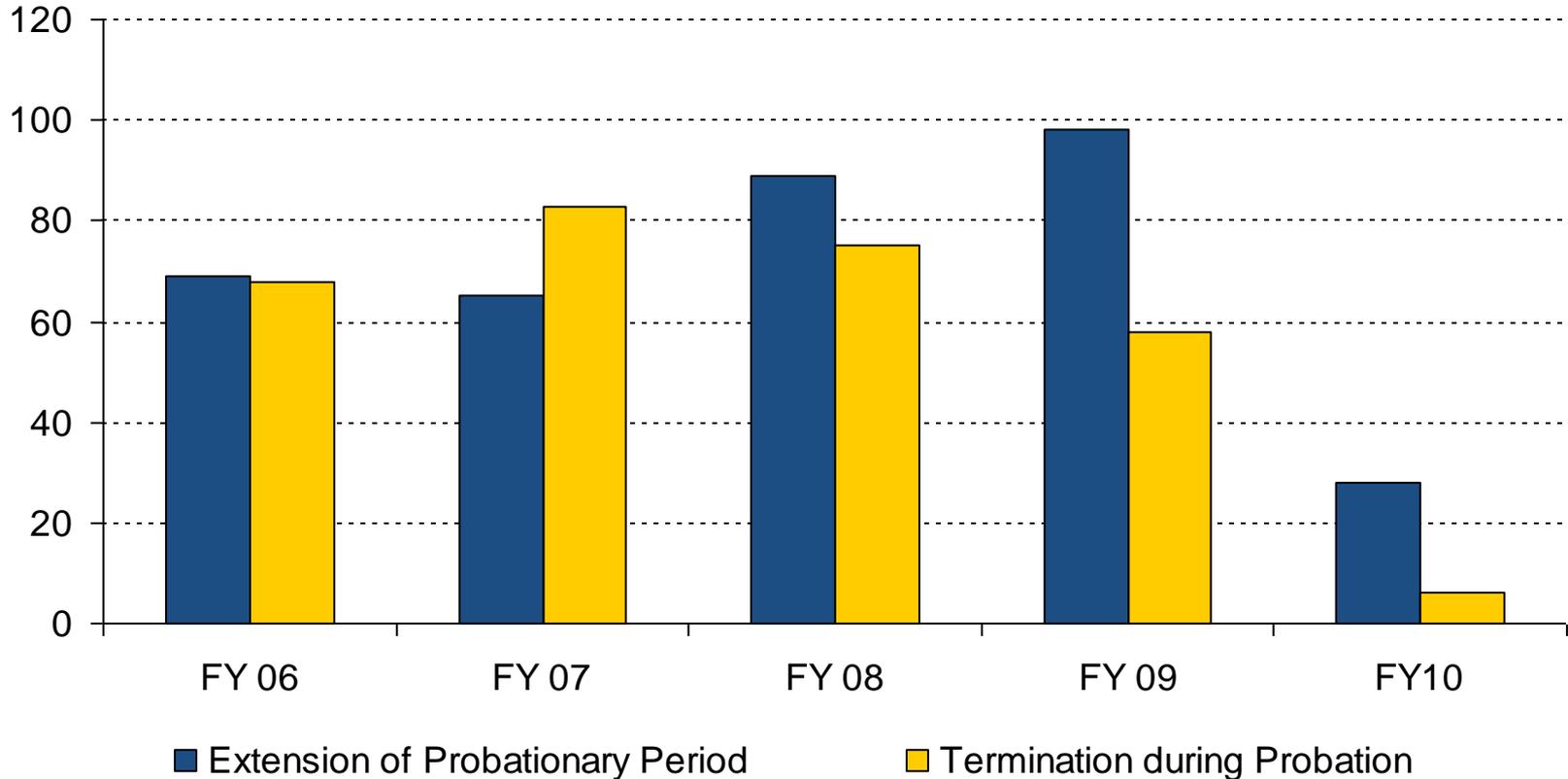
OHR has identified a series of sub-measures to support the headline measure:

- Sub-measure 1: Extensions and terminations during employee probation
- Sub-measure 2: Disciplinary actions
- Sub-measure 3: ADR hearings by fiscal year
- Sub-measure 4: Results of ADR process – FY2010
- Sub-measure 5: Grievances by employee unit



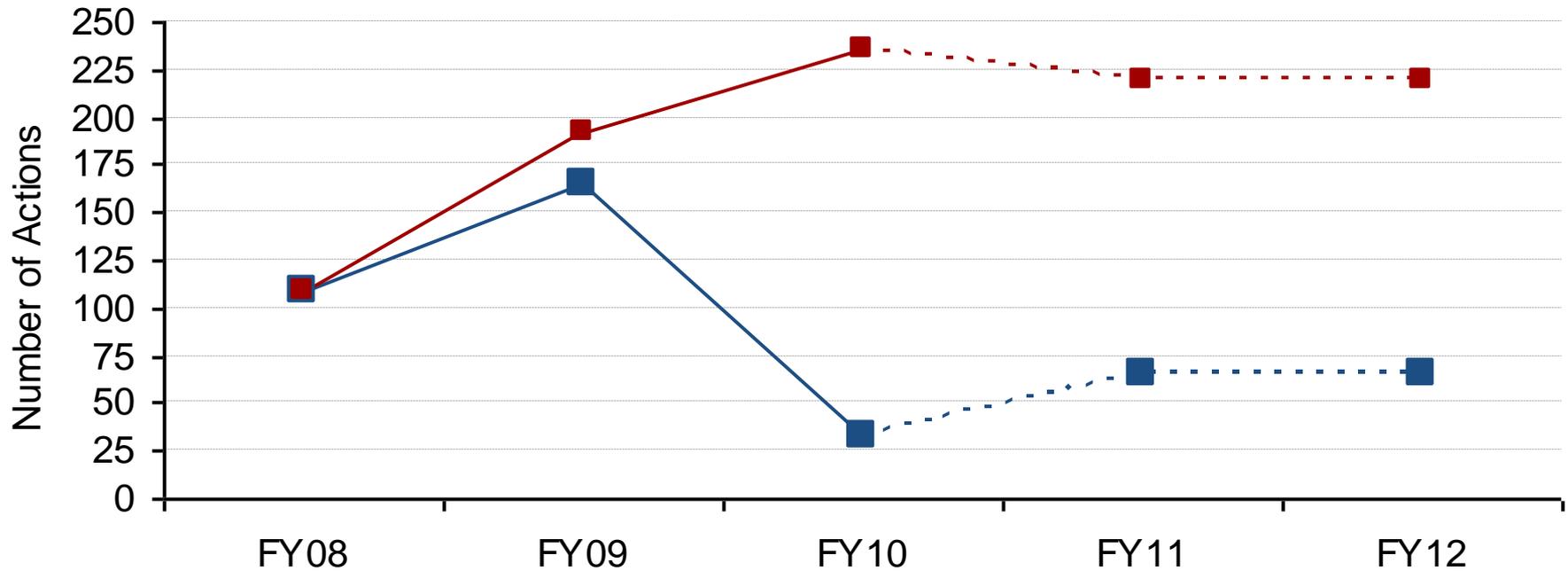
Source: OHR

Labor/Employee Relations Sub-measure 1: Extensions and terminations during employee probation



Source: OHR

Labor/Employee Relations Sub-measure 2: Number of non-merit and merit system employee disciplinary actions



1. Disciplinary actions for non-merit system employees
2. Disciplinary actions for merit system employees

■ Non-Merit

■ Merit



Source: OHR

Labor/Employee Relations Sub-measure 3 & 4: ADR Hearings by Fiscal Year Results of ADR Process – FY2010

	FY05	FY06	FY07	FY08	FY09	FY 10
ADR Hearings	93	92	73	108	78	151

Number of cases where, relative to proposed discipline, outcome was...	Termination	Pay Reduction	Dismissal	Suspension	TOTAL
Upheld	0	0	5	10	15
Resigned/Retired	1	0	12	0	13
Decreased	0	4	32	86	122
Increased	0	0	0	0	0
Undecided	0	0	1	0	1
TOTAL	1	4	50	96	151

Approximately 90% of all cases that came to ADR resulted in a jointly acceptable outcome via panel recommendation or pre-hearing settlement.



Source: OHR

Labor/Employee Relations Sub-measure 5: Grievances by Employee Unit

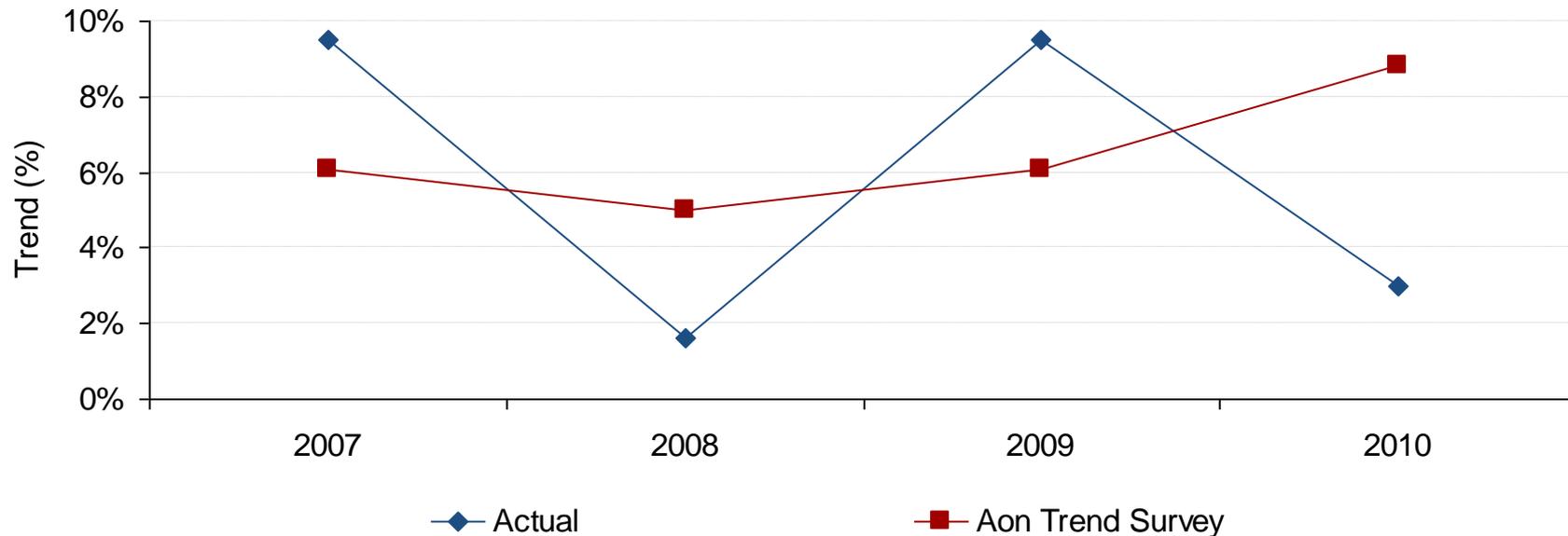
Employee Unit	2006	2007	2008	2009	2010	TOTAL
IAFF	10	5	13	9	14	51
MCGEO	23	13	17	6	25	84
FOP	44	36	28	32	33	173
Non-represented	0	55	7	12	5	79
TOTAL	77	109	65	59	77	387



Source: OHR

Benefits - Headline Measure

Healthcare trend history



	FY07	FY08	FY09	FY10 Actual	FY11 Proj	FY12 Proj	FY13 Proj
Mont Co Trend (%)	9.5%	1.6%	9.5%	3.0%	--	--	--

The measure compares our percent increase (trend) measured against the Aon Trend Survey data.



Source: OHR

Health Benefits - Average monthly employer premium

Source: OHR, Health Benefits Jurisdictional Comparison, 1/5/10

Average monthly premium across all offered plans

Organization	Single	Employee + Spouse*	Family
Montgomery Co	597.69	1,106.93	1,756.78
MCPS	474.10	932.92	1,329.65
MNCPPC	369.76	741.87	1,107.31
Montgomery College	359.22	970.43	970.43
Anne Arundel Co	427.02	910.59	1,178.42
Prince George's Co	362.09	725.82	1,001.19
Howard Co	438.06	1008.05	1,282.89
Baltimore Co	441.22	861.94	1,227.59
Fairfax Co	399.83	743.66	1,031.89

Range (excluding Mont. Co.)	High	474.10	1,008.05	1,329.65
	Low	359.20	725.82	970.43

Based on the March 2010 CountyStat meeting on health benefits, OHR committed to revise its performance measure to track cost over time.



* Not all organizations split employee + 1 into "employee + spouse" and "parent + child."

Premiums reflect the total cost of health, prescription, dental and vision coverage. For those with Rx, dental and vision carve-outs, those supplemental premiums have been added in. Where more than 1 option exists, the plan that most closely matched the highest enrollment supplemental plan for Montgomery County was chosen. Source: (1) OHR, Health Benefits Jurisdictional Comparison, 1/5/10



Benefits - Headline Measure

Average of per employee per month claims cost during a 12-month period

OHR has identified a series of sub-measures to support the headline measure:

- Point-of-Service (POS) average per employee per month medical and prescription costs
- Health Maintenance Organization (HMO) average per employee per month medical and prescription costs
- Prescription costs: Actual versus expected costs
- Prescription costs: Retail versus mail order prescription costs
- Prescription costs: Brand drugs versus generic drugs
- Prescription costs: Shift in high option prescription employee/employer cost-share



Source: OHR

Benefits Sub-Measure 1 & 2 Trend Rate History – POS and HMO Plans

Trend (%) - Average per employee per month medical and prescription costs

Trend (%)	2007	2008	2009	2010
POS – Mont. Co.	8.3%	0.1%	9.1%	10.6%
Aon Trend Survey (Natl)	10.8%	10.5%	10.4%	10.6%

HMO – Mont. Co.	14.7%	3.5%	8.6%	-3.9%
Aon Trend Survey (Natl)	10.9%	10.6%	10.4%	10.5%

Note: Montgomery County trend is based on average per employee per month medical and prescription costs. Aon trend is from Aon Hewitt Survey 2010.

The measure compares our percent increase (trend) measured against the Aon Trend Survey data.



Source: OHR

Benefits Sub-Measures

Cost containment for the County's prescription plan

Effect of Prescription Cost Reduction Strategies on Per Capita Claims

	2008	2009	2010
Actual Net Cost	\$1,636	\$1,659	\$1,666
Expected Net Cost*	\$1,636	\$1,794	\$1,968

*Absent plan design and cost sharing changes.

Utilization – Retail vs. Mail Order Prescriptions

	2008	2009	2010
Retail	86.9%	77.4%	70.7%
Mail Order	13.1%	22.6%	29.3%

Based on Caremark's 2010 report, the mail utilization for their book of business is 20.3% and for the government industry is 20.4%.

Utilization – Brand Drugs vs. Generic Drugs

	2008	2009	2010
Brand Drugs	46.2%	44.4%	40.1%
Generic Drugs	53.8%	55.6%	59.9%

Based on Caremark's 2010 report, the difference in cost for a generic drug is on average about \$90 less than for a brand drug.

Source: OHR

CountyStat



Benefits Sub-Measures

Cost containment for the County's prescription plan

Shift in High Option Prescription Employee/Employer Cost-Share

High \$4/\$8 Option Employer Contribution

Strategy	2008	2009	2010
80% ER cost-share	\$119.50	\$121.72	\$137.75
Buy-up cost-share	\$119.50	\$97.38	\$97.38

High \$5/\$10 Option Employer Contribution

Strategy	2008	2009	2010
80% ER cost-share	\$0.00	\$120.14	\$135.96
Buy-up cost-share	\$0.00	\$97.38	\$97.38

Employer contributions to the High Option prescription plan is limited to the value of the employer contribution of the Standard Option prescription plan.



Source: OHR

Benefits Sub-Measures

Cost containment for the County's prescription plan

Prescription Enrollment Migration resulting from the change in cost sharing arrangements

Enrollment by Plan as of January 1

% of Employees	2008	2009	2010
High \$5/\$10 Option	0	5,270	4,584
High \$4/\$8 Option	10,039	4,133	3,378
Standard Option	331	1,249	2,636

% of Employees	2008	2009	2010
High \$5/\$10 Option	0%	49.5%	43.3%
High \$4/\$8 Option	96.8%	36.8%	31.9%
Standard Option	3.2%	11.7%	24.9%



Source: OHR

Headline Measure – Benefits

Monitor the ERS disability retirement process for active employees and continuing the re-evaluation of retirees receiving disability retirement

OHR has identified a series of sub-measures to monitor disability retirement:

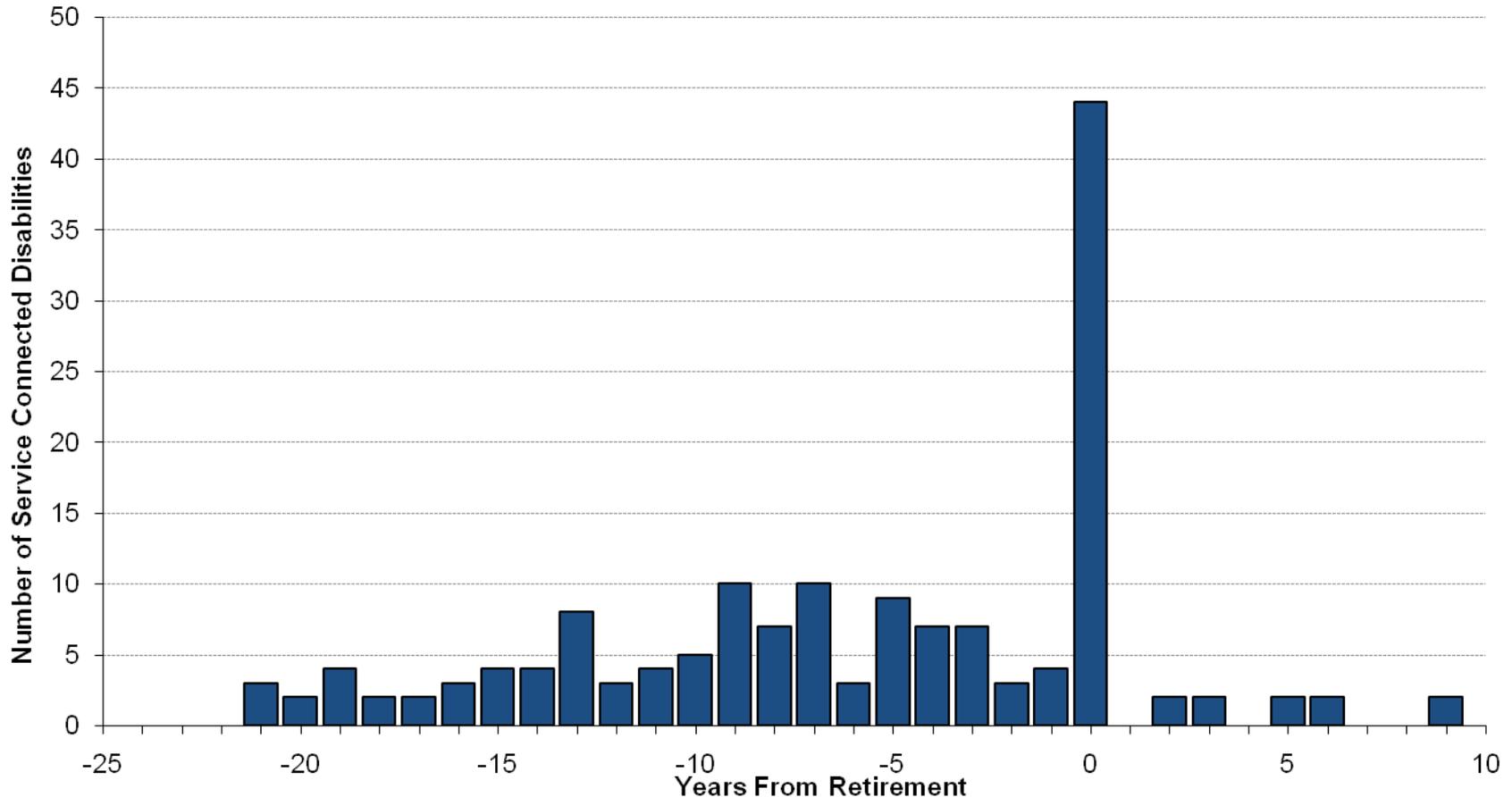
- Total cost difference between accrual and disability retirement amounts
- Number of disability retirees



Source: OHR

Retirement: Disability Versus Normal Retirement Date Since Jan. 1, 2004

Source: CountyStat Meeting, 9/1/2009



Of the 44 individuals shown retiring within +/- 6 months of their normal retirement date, 35 retired on the exact date, and another 7 were within 1 month.

Negative years represent years until normal retirement. Positive years represent years after the normal retirement date.



Benefits Sub-Measures

Total Cost Difference Between Accrued and Disability Retirement Amounts

By Department	Total Cost Difference Between Accrued and Disability Amount					
	2005	2006	2007	2008	2009	2010
Environmental Protection	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
General Service	\$0.00	\$23,009.00	\$35,985.00	\$0.00	\$25,824.00	\$0.00
Housing & Community Affairs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Liquor Control	\$0.00	\$49,225.00	\$39,286.00	\$0.00	\$0.00	\$0.00
Corrections and Rehabilitation	\$39,617.00	\$72,905.00	\$45,524.00	\$30,066.00	\$23,454.00	\$28,079.00
Transportation	\$25,216.00	\$12,698.00	\$13,275.00	\$45,761.00	\$0.00	\$0.00
Permitting Services	\$0.00	\$21,683.00	\$4,401.00	\$0.00	\$0.00	\$0.00
Finance	\$0.00	\$0.00	\$0.00	\$24,842.00	\$0.00	\$0.00
Health and Human Services	\$5,400.00	\$17,759.00	\$7,339.00	\$8,894.00	\$0.00	\$210.00
Libraries	\$10,314.00	\$21,833.00	\$0.00	\$0.00	\$0.00	\$0.00
Fire and Rescue	\$83,310.00	\$199,010.00	\$64,489.00	\$63,754.00	\$20,185.00	\$41,756.00
Police	\$181,639.00	\$347,218.00	\$167,979.00	\$465,558.00	\$190,568.00	\$252,703.00
Emergency Mgmt & Homeland Security	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Human Resources	\$0.00	\$0.00	\$19,971.00	\$0.00	\$0.00	\$0.00
Management & Budget	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Recreation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Sheriff's Office	\$0.00	\$0.00	\$45,887.00	\$32,932.00	\$0.00	\$0.00
All Departments	\$352,063.00	\$765,340.00	\$444,136.00	\$671,807.00	\$281,190.00	\$411,883.00
2010 Dollars (with COLAs through 7/1/2009)	\$399,963.00	\$839,378.00	\$471,571.00	\$687,909.00	\$281,706.00	\$411,883.00

Note: The cost of disability retirement is calculated as the eligible disability benefit (either the minimum disability benefit or the accrued benefit, whichever is greater) minus the accrued benefit. Data by fiscal year 07/01/2005 through 06/30/2010, by department.

The cost difference between accrued and actual disability benefit increased in 2010. This reflects that less senior employees retired on disability (hence a larger gap between the accrued benefit and the disability benefit)



Source: OHR

Benefits Sub-Measures

Number of Disability Retirees

By Department	Number of Disability Retirees					
	2005	2006	2007	2008	2009	2010
Environmental Protection	0	0	1	0	0	0
General Service	0	2	3	1	2	0
Housing & Community Affairs	0	1	0	0	0	0
Liquor Control	0	3	2	0	2	0
Corrections and Rehabilitation	3	3	3	1	2	2
Transportation	4	6	5	5	0	0
Permitting Services	0	1	1	0	0	0
Finance	0	0	0	1	0	0
Health and Human Services	2	3	3	1	0	2
Human Rights	0	0	0	0	0	1
Libraries	2	2	1	0	0	0
Fire and Rescue	9	14	5	7	7	6
Police	16	24	13	24	10	18
Emergency Mgmt & Homeland Security	0	0	0	0	1	0
Human Resources	0	0	1	0	0	0
Management & Budget	1	0	0	0	0	0
Recreation	1	0	1	0	0	0
Sheriff's Office	0	0	2	1	0	0
All Departments	38	59	41	41	24	29

Data by fiscal year 7/1/2005 through 6/30/2010



Source: OHR

Headline Measure – Benefits

Monitor the ERS disability retirement process for active employees and continuing the re-evaluation of retirees receiving disability retirement

- **Recruitment of Disability Review Panel (DRP) doctors**
 - Contracted with Managed Care Advisors as the independent medical organization to recruit qualified DRP doctors.
 - 15 doctors have been recruited.
 - The final selection process is underway.
- **Process changes as a result of Bill 35-10**
 - Amended the definition of final earnings to extend the imputed compensation beyond FY10 for certain members who apply for disability retirement benefits under the ERS by a certain date.
 - Modified the qualifications and selection procedure for the DRP.
 - Allowed the DRP to meet weekly via teleconference or web conference.
- **Initiatives**
 - Converting from paper to electronic records would allow the DRP members to review information and write reports, assign tasks, request information and finalize recommendations on-line securely.



Source: OHR

Wrap-up

- Follow-up items

